

The State Bar of California

REQUEST FOR PROPOSAL



This document is a Request for Proposal (“RFP”) for Furniture, Fixtures and Equipment.

The State Bar is seeking proposals for purchase, delivery and installation of Furniture, Fixtures and Equipment (“FF&E”) for their offices in the newly purchased office building at 845 South Figueroa Street, in downtown Los Angeles. Qualified Furniture Manufacturers and Office Furniture Dealers (“Bidders”) are requested to provide bids to supply the FF&E and related services as outlined in this document.

Each interested party should note their intent to respond to this RFP via email to: margaret@m-fitzsimons.com on or before 5:00 p.m. June 25, 2013.

Please submit 8 copies of your proposal no later than 4 p.m. on July 9, 2013 to:

LEAN ARCH Inc.
530 S. Spring Street 6th floor
Los Angeles CA 90013

Attn: Margaret Fitzsimons
202-257-1311
margaret@m-fitzsimons.com

I. INTRODUCTION

The State Bar of California (“the State Bar”) created in 1927 by the Legislature and adopted into the California Constitution in 1960, is a public corporation within the judicial branch of state government. The primary purpose of the State Bar is to serve as an administrative adjunct to the California Supreme Court in all matters pertaining to the admission, discipline, and regulation of California lawyers. The California Constitution, the State Bar Act and California Rules of Court vest in the State Bar the duty to regulate the legal profession, formulate and elevate educational and professional standards, raise the quality of legal services, advance the science of jurisprudence, and aid in the improvement of the administration of justice.

The State Bar is a unified, or integrated bar, and membership is mandatory for all attorneys who are licensed to practice law in the state. In addition to its mandated

licensing, disciplinary and certification functions, the State Bar offers a number of other programs designed to assist, educate and protect its members and the public. The State Bar's programs are financed by fees paid by attorneys and applicants to practice law. The State Bar has over 242,000 members, making it the largest unified state bar in the country. The State Bar has offices located in Los Angeles and San Francisco. For more than 80 years, The State Bar of California has shaped the development of the law, regulated the professional conduct of the state's lawyers and provided greater access to the justice system for all citizens. More information about the organization can be found at <http://www.calbar.ca.gov/AboutUs.aspx>.

II. STATEMENT OF WORK

A. Project Scope

The scope of this RFP includes the purchase, delivery and installation of Furniture, Fixtures and Equipment ("FF&E") which conform with the State Bar's design criteria. This RFP is divided into six (6) primary categories of FF&E, comprised of (A) Private Office Furnishings, (B) Open Area Workstations, (C) Task and Conference Seating, (D) Storage, (E) Conference Room Furnishings and (F) Ancillary Furnishings. In addition to the furniture purchase subject to this RFP, the State Bar would like to establish a discount structure for future purchases from the same manufacturers, and an ongoing service agreement with the selected Authorized Furniture Dealer for their new Los Angeles offices. Additional project goals include providing quality office furnishings that are durable, easily maintained, functional, visually and acoustically pleasing, and incorporating the latest technology and sustainable design features which promote improved quality of work life.

B. Minimum Requirements for Participation

The State Bar has utilized the Services of LEAN ARCH Inc. and M-Fitzsimons, Inc. to evaluate and pre-qualify appropriate lines of commercial furnishings based on the following criteria:

1. Manufacturer's product for all systems furniture and private office furniture shall be on GSA Schedule
2. All products shall also be on U.S. Communities Government Purchasing Alliance contract
3. Manufacturer & Dealer have the ability to purchase/sell either on or off of GSA Schedule or U.S. Communities contract
4. Manufacturers maintain product lines which meet the functional and aesthetic criteria for the project

A quantity of three (3) major systems furniture manufacturers has been considered an appropriate and competitive number of bidders for this project. Each Furniture Manufacturer has pre-selected a respective Authorized Furniture Dealer as their partner to execute the scope of this project. Dealers are responsible to solicit pricing for all specifications and contents of this RFP, including those specifications from manufacturers other than their partner systems furniture manufacturer.

C. Building and Project Description

The building is a five-story office building constructed in 1970, and has undergone a complete base building renovation. Tenant improvements are now in progress. The State Bar will occupy approximately 110,000 square feet of their new building, including:

1. A portion of the first floor (approximately 4,000 RSF) which will serve as the State Bar's visitor reception and security screening area.
2. Full floors 2, 3, 4 and 5 (approximately 107,000 RSF), consisting of standard office space, private offices, workstations, conference rooms, storage and work rooms, kitchens and break rooms, court rooms and additional ancillary spaces.

D. Product Samples and Demonstration

1. Manufacturer showroom tours: Each manufacturer and dealer team will be given the opportunity to present their proposals and furniture samples: 30 minutes to present proposal and qualifications and 30 minutes to demonstrate specific examples of furniture specs, organized in order of specifications. All products demonstrated shall be direct examples of furniture specified (see ***Attachment E: Project Schedule***).
2. Mock-up: The winning bidder will be required to provide a Workstation-Mockup installed at State Bar's existing office space at AT&T Center: 1149 S. Hill Street, Los Angeles, CA, 90015, 7th floor (see ***Attachment I: Mock-up Floor Plan***). Primary goal of the mockup will be to demonstrate new furniture to employees, and confirm all final specifications prior to order finalization. The mockup will include three (3) typical workstations demonstrating all options, three (3) task chairs, one (1) PO-1, and at client's discretion, conference tables to include three (3) Mobile tables, three (3) conference chairs, one (1) 48" round conference table, six (6) 3-high lateral files with wood top, two (2) 3-high electrostatic-painted lateral files.

E. Warranty

All furniture items shall be new and guaranteed for materials and workmanship as follows (provide copy of warranty information):

1. Seating: Minimum of twelve (12) year basic warranty
2. Case goods: Minimum of ten (10) year basic warranty
3. Systems Furniture: Minimum of fifteen (15) year basic warranty

F. Manufacturer/Dealer/Installer Requirements

This document and all attachments, including digital files, comprise the total furniture RFP package. Bidder must accurately complete and include all items. Any failure to submit a complete package may result in elimination from the bidding process.

1. All furniture, fixtures, equipment, accessories and their installation shall conform to all local, state and National building and fire codes. Any potential conflict in this RFP shall be brought to the attention of the Design team for resolution during the bid phase. Any items needing adjustment/treatment to meet code shall be identified in bid submission.
2. Refer to ***Attachment C: Base Furniture Specifications*** for all product details and base specifications. These specifications are for specific products: all bidders must submit bids for exact products as specified, no substitutions will be allowed. Additional Alternates recommended by manufacturers must be presented on the separate ***Alternate Grade Bid*** forms provided (Attachment A-2).
3. Any discrepancies or omissions found in the documents of this RFP, including plans and drawings, shall be identified in writing to the Design Team for resolution prior to submitting the final bid. Bidder is responsible for accuracy of final bid, for securing bids from all required subcontractors, and for completeness of bid.
4. Bidders are responsible for confirming that all workstations, offices and furniture specified are complete, and will be fully functional upon installation. Identify any items which are anticipated or required for a complete installation, but not shown in RFP and identify all concerns (eg: function, durability) within final Bid submission.
5. Bidders are responsible for cross referencing specifications with floor plans to provide accurate bids (eg: floor plans represent location of shared panels in workstations). In addition to providing total project cost, average cost per workstation shall be identified (***Attachment C: Base***

Furniture Specifications).

6. Furniture dealer/manufacturer is responsible for field measuring all locations for new furniture, including required clearance and power locations to assure proper fit, code compliance, alignments and clearances, prior to shop drawing and final order submissions.
7. Dealer is responsible for coordinating all aspects of delivery & installation needs with the building owner/manager, General Contractor and city officials as required, prior to submitting final bid. Any and all associated costs shall be included in final bid. Bidders must be aware of the following street and building conditions that may impact delivery:
 - a. Loading Docks: Delivery will be through two separate, adjacent loading docks on 8th Place (between Figueroa and Francisco) which can accommodate medium-size trucks but not large tractor/trailers. Loading dock dimensions are as follows--
 - Loading dock 1 entry width: 22'-6"
 - Loading dock 2 entry width: 10'-10"All other dimensions are the same in both loading docks--
 - Entry height clearance: 12'
 - Length from entry gate to interior dock platform: 24'-8"
 - Additional length from curb to entry gate: 9'-9"
 - Height of dock platform: 38"
 - b. Street Access: 8th Place is a very narrow street, such that a large tractor trailer extending out of the loading dock would block traffic in both directions, which will not be permitted. It may be possible, however, to close one traffic lane to accommodate a large tractor trailer ***parked on*** 8th Place.
 - c. Elevators: Two passenger elevator cabs located approximately 75' from the loading dock platform service all floors. In addition, one freight elevator cab located at the loading dock services floors 1, 2, and 3 only. Elevator dimensions are as follows--

Passenger elevators:

 - Door: 3'-6" wide (center position)
 - Cab: 4' - 7" deep x 6'-8" wide x 7' high

Freight elevator:

 - Door: 3'-6" wide (center position)
 - Cab: 4'-5" deep x 6'-7" wide x 7' high
 - d. Stairs: Stairs are located next to the passenger elevators.

8. Dealer shall coordinate the following details with the AV Consultant and General Contractor (Refer also to *Attachment K: Audio Visual Furniture Requirements*).
 - a. Clearances, weights and venting required for all AV equipment to be installed in furniture
 - b. Wire management and cable access clearances, power/data needs, receptacles, cover-plates and accessories as required where interfaces with furniture
9. Shop drawings are required for all systems furniture and private office layouts, all custom furniture and case work. Submit a minimum of three (3) sets of shop drawings for Design Team approval prior to order, allowing one (1) week minimum for review.
10. Submittal samples are required for all finishes. Submit a minimum of three (3) sets of all finishes and materials, including actual dye-lots, for Design team approval prior to order. Finishes shall be labeled to correspond with Specifications.
11. All finishes, including custom wood finishes, are subject to Design Team approval.
12. All furniture installed on non-carpeted floors shall receive appropriate glides/felt padding as required to prevent slipping and scratching. All chairs with casters installed on carpet shall receive appropriate durable carpet casters.
13. Manufacturer to provide one dye-lot per floor of like-upholstered items. Dye-lot differences between floors shall be minimal.
14. Bidder certifies that all product presented in bid is the authentic manufacture and product specified in Base Specifications, and will be the actual product installed. All products shall bear label of the manufacturer.

III. CONTRACT BID INFORMATION and PRICING

A. Base Furniture Specifications

A full set of furniture specifications are included which represent preferred design intent. Any deviation from these specs must be identified in *Attachment C: Base Furniture Specifications*. Bidder must provide complete and accurate bid for Base Specifications at a minimum. Any clarifications to Base Specification (deviation from spec) must be indicated in *Alternate/Notes* column on Attachment C. Provide unit cost for each item in

space provided in red text at top of the first sheet of each specification on the pdf file. Additionally, bidder shall enter requested spec information and unit costs in red text where indicated within each specification under *Alternates/Notes* column.

B. Summary Base Bid

The total cost for each of the following main areas (A. Private Offices, B. Workstations, C. Task Seating, D. Storage, E. Conference Rooms and F: Ancillary) shall be recorded on this sheet by entering bid amount in the unlocked yellow cells in ***Attachment A-1: Summary Base Bid*** form. The bid amounts entered reflect the sum of all furniture unit costs for each line item in Summary Base Bid form (see column on bid form indicating spec numbers included in each line).

C. Alternate Grade Bid

Bidder is requested to provide an economical alternate for a minimum of one (1) Workstation, one (1) Casework grouping (for PO1 & PO3), one (1) Task Chair, one (1) Conference Chair, one (1) Guest Chair and one (1) Mobile conference table under respective areas on ***Attachment A-2: Alternate Grade Bid***. Any additional manufacturer proposed alternates shall also be recorded under respective areas where indicated. The proposed alternates shall match base bid design intent, but represent a “tier down” reduction in cost from the Base Specification as detailed in ***Attachment C: Base Furniture Specifications***. For each Alternate proposed above, utilize the provided ***Attachment D: Alternate Specifications*** sheets to create a separate spec sheet for each item. Complete all information on form and attach all materials listed on form.

D. Proposed Dealer and Installer Bid

Bidder is requested to propose two (2) qualified installers and two (2) separate delivery and installation bids per instructions in ***Attachment A-3: Delivery, Installation & Volume Discounts***. The State Bar reserves the right to choose the field service that best satisfies the project budget, schedule and manpower requirements.

E. Account Discount Structure

The State Bar requires each manufacturer and dealer to state its products lines and associated governing discounts for the current and any future purchases. Enter the relevant information in ***Attachment A-4: Future Discount Pricing*** form as indicated, including the guaranteed date through which discounts will be honored.

F. Material Exhibits

Include in your proposal the following additional exhibits, labeled as indicated:

1. Two (2) sets of finishes, labeled to correspond with respective specs.

2. Enlarged plans & 3D/elevations for: (one (1) each PO-1 and PO-3, four (4) pack with file bays on exterior for WS-1, WS-2, WS-3). Include all dimensions (vertical and horizontal), clearances, finish locations, worksurface seams, storage capacity (boxes and filing inches), components, power & wire management labeled, 1/2" scale. Manufacturer may utilize drawings and renderings previously submitted, provided they have been updated per this RFP.
3. Full set of floor plans including all furniture with power feeds, dimensions, and clearances at 1/8" scale, printed on 30x42 printed sheets.
4. Corresponding CAD Files (ACAD r2000).
5. Two (2) renderings of workstation group (one for each option), including file bay with wood tops at ends, and (1) each PO1, PO-3 office, illustrating updated base specs & options. Manufacturer may utilize renderings previously submitted, provided they have been updated per this RFP.
6. Two (2) sets of Detailed "order" forms, (standard format used by manufacturer to enter information for pricing).
7. Electrical System Information for all powered furniture.
8. Provide sustainable information for both manufacturer, dealer and products in Base Furniture Specifications for the following at a minimum: A. Office Casegoods, B. Workstations, C. Task Seating, D. Storage, and E. Conference Rooms. Provide company sustainable practices as well as data on manufacturing processes and materials specified.

IV. GENERAL INFORMATION

The submission requirements for this RFP are set forth below. A proposal shall constitute an irrevocable offer for 180 business days following the deadline for its submission. Reference to a certain number of days in this RFP shall mean business days unless otherwise specified.

Contact with State Bar personnel in connection with this RFP may not be made other than as specified in this RFP. Unauthorized direct or indirect contact with any State Bar personnel may be cause for rejection of a bid.

A. Submission Requirements

To be considered responsive, a proposal must contain the following, prefaced by a table of contents, referenced by number and in the order below.

1. A brief description of the history and organization of the bidder's firm, and of any proposed subcontractor, including major furniture manufacturer, partner dealers and installation providers.
2. Copies of business licenses, professional certifications or other credentials, together with evidence that bidder, if a corporation, is in good standing and qualified to conduct business in California. Business licenses required for dealers and installers selected as well.
3. The most recent year's annual reports, or comparable document, including detailed current profit and loss, assets and liabilities, and other relevant financial data. Bidders must submit **Attachment B: Vendor History Questionnaire** electronically in native .xlsx format per instructions below.
4. A description of at least three (3) similar projects completed by the bidder within the past three (3) years. Include personal references with contact information for each.
5. Key qualifications, background and experience of the project director and other staff proposed to work on the project.
6. Bidder shall identify all Government affiliations and organizations with which manufacturer and dealer have association.
7. Furniture installation must be competitively bid to at least two (2) vendors, one of which must be Union. The State Bar is not required to choose Union installer, but is permitted to work with whichever is most qualified and most cost advantageous for this project. Provide back-up documentation for all bids. Dealer shall make a recommendation of the installer which meets the project criteria, and include this installation price on **Attachment A-3: Delivery, Installation and Volume Discounts** form. Identify standard hours and provide a separate alternate cost for after-hours labor
8. A description of the chronology for completing the work, including a time line and deadlines for each task. See **Attachment E: Project Schedule** for key deliverable dates and milestones.
9. A detailed cost proposal, for both the furniture and equipment specifications as detailed in **Attachment C: Base Furniture Specifications** and an alternate solution one quality grade lower. Bidders must submit **Attachment A-1: Summary Base Bid** and **Attachment A-2: Alternate Grade Bid** electronically in native .xlsx format per instructions below. The State Bar has the ability to purchase on either GSA/U.S. Communities schedule or standard schedule, whichever is most cost advantageous. Bidder shall identify difference in discounting for GSA./U.S.

Communities schedule vs. standard bidding as indicated. Additional project discounts based on purchasing multiple furniture lines together as indicated on the bid cost forms will be considered (*see evaluation process below*). It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss leader” as defined in [Section 17030](#) of the Business and Professions Code. As the State Bar may award a contract based on the initial offer, a bidder should make its initial offer on the most favorable terms available. The State Bar reserves the right, however, to have discussions with those bidders falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

10. A written acknowledgement of the acceptance of the Contracting Requirements set forth in section V of this RFP. Specific terms may be reserved for future negotiation, but must be clearly identified and reasons given for the reservation.

B. Submission Requirements Format Summary

Proposals should be prepared simply and economically, providing a straightforward and concise description of the Vendor’s ability to meet the requirements of this RFP. Emphasis should be on completeness and clarity of content.

1. Deliver 8 physical hardcopies to the attention of Margaret Fitzsimons, c/o LEAN ARCH Inc. no later than 4 p.m. July 9, 2013.
2. Each set should include all attachments requested, including copies of the electronic attachments itemized below.
3. Deliver electronically with above (one set--CD-ROM, DVD, or USB flash drive) in native unlocked format (except as noted below):
 - a. Attachment A-1 4: Itemized Cost Proposals (.xlsx)

Tab A-1	Base Summary Bid
Tab A-2	Alternate Grade Bid
Tab A-3	Delivery, Installation and Volume Pricing
Tab A-4	Future Discount Pricing
 - b. Attachment B: Vendor History Questionnaire (.xlsx)

Tab B-1	Manufacturer
Tab B-2	Dealer
 - c. Attachment C: Base Furniture Specifications (.pdf)

- d. Attachment D: Alternate Specification Sheets (.doc)
- e. Attachment E: Project Schedule (.xlsx)
- f. Attachment F: Furniture floor plan diagrams, labeled and cross referenced to furniture specifications (*reference only, do not return*)
- g. Attachment G: Lateral File diagram, labeled with new and existing files and notes (*reference only, do not return*)
- h. Attachment H: Furniture Floor Plan CAD files (ACAD r2000, .dwg and hard copy of 30x42 sheets)
- i. Attachment I: Mock- up Floor Plan (*reference only, do not return*)
- j. Attachment J: Conference Center Layout Diagram (.pdf and .dwg)
- k. Attachment K: Audio Visual (AV) Furniture Requirements (*reference only, do not return*)

Proposals that fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. The State Bar, solely upon its own discretion, will judge vendors on their overall compliance, and may judge a vendor to be materially compliant, even if that vendor is non-compliant to a particular requirement of the RFP.

If specific submission requirements are particularly large and self-contained they may be included in a separate appendix rather than in the body of the proposal. Submittals should not direct the evaluation team to general brochures, marketing materials or websites to obtain information related to the specific submission requirements; submittals that utilize references to external materials as an answer will be considered non-responsive.

Submittals should provide straightforward and concise information that fulfill the requirements of the RFP. Emphasis should be placed on brevity, conformity to the State Bar's instructions, and completeness and clarity of content. Proposals should not include generic promotional materials and graphics that increase page count and PDF file size without addressing substantive content. Hard copy brochures and marketing materials may be included as a supplement if desired.

C. Rejection of Proposals

The State Bar reserves the right in its sole discretion to reject any or all proposals in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. If a

proposal fails to meet a material requirement of the RFP, or if it is incomplete or contains irregularities, the proposal may be rejected. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements.

Immaterial deviations may cause a bid to be rejected. The State Bar may or may not waive an immaterial deviation or defect in a proposal. The State Bar's waiver of an immaterial deviation or defect will in no way modify the RFP or excuse a bidder from full compliance with the RFP requirements.

Any proposal may be rejected where it is determined to be not really competitive, or where the cost is not reasonable.

Proposals that contain false or misleading statements may be rejected if in the State Bar's opinion the information was intended to mislead the State Bar regarding a requirement of the RFP.

D. Evaluation Process and Highest Scored Bidder

An evaluation team will review, in detail, all proposals that are received to determine the Highest Scored Bidder (“HSB”).

Following the initial review and screening of the written Proposals, using the selection criteria described below, bidders may be invited to participate in the final selection process, which may include participation in an oral interview and/or submission of any additional information as requested by the State Bar.

The State Bar reserves the right to determine the suitability of proposals on the basis of a proposal's meeting administrative requirements, technical requirements, the review team's assessment of the quality and performance of the equipment and services proposed, and cost. The State Bar also reserves the right to award a portion of six (6) product areas to one or more bidders, if in the best interest of the project (see Attachment A-3, additional discounts section).

During the evaluation process, the State Bar may require a bidder’s representative to answer questions with regard to the proposal and/or require certain bidders to make a formal presentation to the evaluation team and/or the State Bar Senior Executive Team. The State Bar may also have discussions with those bidders falling within a competitive range, request revised pricing offers from such bidders, and make an award and/or conduct negotiations thereafter.

This Request for Proposal does not commit the State Bar to awarding a Contract. Bidders shall bear all costs incurred in the preparation of the Proposal and participating in the Proposal evaluation process. The State Bar reserves the right to reject any and all Proposals, to accept the Proposal it considers most favorable in its sole discretion, and to waive minor irregularities. The State Bar further

reserves the right to seek new Proposals when such procedure is considered by it to be in the best interest of the State Bar.

1. The following criteria will be used in reviewing and comparing the proposals and in determining the HSB. The weight to be assigned to each criterion appears following each item.
 - a. Responsiveness of the proposal to the submission requirements set forth in the RFP (5%).
 - b. Agreement with the State Bar's contracting requirements (5%).
 - c. The **manufacturer's** technical ability, financial viability, capacity, and flexibility to perform the contract in a timely manner and on budget, as verified by, e.g., the quality of any demonstration, client references, demonstrated success in projects with similar requirements and any other contracts with the State Bar. Includes the ergonomic design, construction quality, warranty and fit/finish of the manufactured products specified. (35%).
 - d. The *manufacturer-selected* **dealer's** technical ability, financial viability, capacity, and flexibility to perform the contract in a timely manner and on budget. (10%).
 - e. The total cost of the proposal solution. If the proposal contains itemized rates, per piece pricing, or commission-based pricing, the State Bar reserves the right to calculate total contracted cost by calculating rates using either previous known usage activity or future projected volume. Costs will be evaluated only if a proposal is determined to be otherwise qualified. Costs should be itemized by type to allow the State Bar to implement the solution over the term of the contract (45%).

E. Award and Execution of Contract

Subject to the State Bar's right to reject any or all proposals, the HSB will be awarded the contract. Notice will be posted at the State Bar's offices at 180 Howard Street, San Francisco, CA and written notice sent to bidders on or about August 2, 2013 of the Bar's intention to award the contract to the HSB. It is anticipated that final selection of the HSB will be made by August 9, 2013. The evaluation team will select a winning proposal subject to approval by the Board of Trustees. Upon selection, the State Bar and the selected Vendor will enter into good faith negotiations on a contract containing, without limitation, the Statement of Work and Contracting Requirements sections below.

No content in this RFP creates, nor construes to create, any contractual relationship between the State Bar and any bidder/vendor. The State Bar makes no commitment by virtue of this RFP, to receive or review of any responsive proposals or participate in any related discussions, and shall have no obligation, to enter into any business relationship or agreement to purchase any services or supplies from any bidder/vendor. The State Bar reserves the right to withdraw this RFP by written notice, to reject any oral offers and to reject any offers submitted in response to this RFP. The State Bar shall incur no liability to bidders/prospective vendors by such withdrawal, rejection or acceptance. The State Bar further reserves the right to accept offers from one or more bidders/vendors. The State Bar shall not be responsible or liable for incurred by any bidder responding to this RFP. The State Bar shall not be responsible for costs, expenses, risks or any financial losses whatsoever, including, without limitation, losses incurred by bidder in responding to this RFP.

No contract or agreement, express or implied, shall exist or be binding on the State Bar before the execution of a written contract by both parties. If agreement on the terms of such a contract cannot be reached after a period deemed reasonable by the State Bar in its sole discretion, the State Bar may enter into negotiations and sign a contract with any other bidder who submitted timely, responsive and responsible proposals to this RFP.

If, after the State Bar and the HSB agree to terms and execute a contract, that contract is terminated for any reason, the State Bar may, in its sole discretion, either enter into negotiations with the next highest scored bidder, or issue a new RFP and begin the proposal process anew.

Questions regarding the State Bar's award of any business on the basis of proposals submitted in response to the RFP, or on any other matter in connection with the selection process, should be addressed in writing to andrew.conover@calbar.ca.gov.

Where written notice is required in this RFP, the notice must be sent by U.S. mail and either facsimile or e-mail.

F. Errors in the RFP

If a bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the bidder should immediately provide the State Bar with written notice of the problem and request that the RFP be clarified or modified. Without disclosing the source of the request, the State Bar may modify the document prior to the date fixed for submission of proposals by issuing an addendum to all potential bidders to whom the RFP was sent.

If prior to the date fixed for submissions, a bidder knows of or should have known of an error in the RFP but fails to notify the State Bar of the error, the bidder shall

bid at its own risk, and if, awarded the contract, shall not be entitled to additional compensation or time by reason of the error or its later correction.

G. Questions Regarding the RFP

Questions regarding the RFP may be addressed in writing to Margaret Fitzsimons at margaret@m-fitzsimons.com. All questions must be submitted no later than 12:00 PM June 27, 2013. Questions and answers regarding the RFP may be shared with all bidders qualified to submit a proposal no later than July 3, 2013.

If a question relates to a proprietary aspect of its proposal and the question would expose proprietary information if disclosed to competitors, the bidder may submit the question in writing, conspicuously marking it as "CONFIDENTIAL." With the question, the bidder must submit a statement explaining why the question is sensitive. If the State Bar concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered, and both the question and answer will be kept in confidence. If the State Bar does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the bidder will be notified.

A bidder, who believes that one or more of the RFP's requirements is onerous or unfair, or unnecessarily precludes less costly or alternative solutions, may submit a written request that the RFP be changed. The request must set forth the recommended change and reason for proposing the change. The State Bar must receive any such request no later than 5 days before the deadline for submitting proposals.

H. Addenda

The State Bar may modify the RFP prior to the date fixed for submission by posting, mailing, emailing or faxing an addendum to the bidders known to be interested in submitting a proposal. If any bidder determines that an addendum unnecessarily restricts its ability to bid, it must notify the State Bar in writing no later than 5 days before the deadline for submitting proposals.

I. Withdrawal and Resubmission/Modification of Proposals

A proposal may be withdrawn at any time prior to the deadline for submitting proposals by notifying the State Bar in writing of its withdrawal. The notice must be signed by the bidder. The bidder may thereafter submit a new or modified proposal, provided that it is received at the State Bar no later than the deadline.

Modification offered in any other manner, oral or written, will not be considered. Proposals cannot be changed after the evaluation process begins.

J. Protest Procedure

A bidder may protest the award if it meets all the following conditions:

1. The bidder has submitted a proposal that it believes is or should have been the HSB, under the criteria set forth above;
2. The bidder believes that its proposal meets the State Bar's administrative and technical requirements, proposes services of proven quality and performance, and offers a competitive cost to the State Bar; and
3. The bidder believes that the State Bar has incorrectly selected another bidder.

A bidder qualified to protest should contact Andrew Conover, Finance Manager, (415) 538-2207, to attempt an informal resolution. If this contact is unable to resolve the protest to the bidder's satisfaction, the bidder must file a written protest within 5 days of the notice of intention to award the contract. The written protest must state the facts surrounding the issue and the reasons the bidder believes the award to be invalid. The protest must be sent by certified or registered mail or delivered personally to:

The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639

Attention: Peggy Van Horn, Chief Financial Officer

Protests will be reviewed and decided by the State Bar's Award Protest Team within 30 days after the State Bar issues written acknowledgment of the protest. In the event that a protest is filed, the contract award will be postponed pending resolution of the protest.

K. News Releases

News releases pertaining to the award of a contract may not be made without the prior written approval of the State Bar.

L. Disposition of Materials

All materials submitted in response to an RFP will become the property of the State Bar of California and will be returned only at the State Bar's option and at the expense of the bidder. One copy of each proposal will be retained for the State Bar's official files and become a public record. Specific limited pages of a proposal, not including proposed cost and compensation, may be marked as proprietary and confidential. The entire proposal cannot be deemed confidential.

The bidder's consent will be requested before release of such confidential pages to non-State Bar personnel. By submitting a proposal, a bidder agrees to these terms and waives any right to pursue a cause of action for damages incurred as a result of the release of any information contained in a proposal.

V. CONTRACTING REQUIREMENTS

Upon selection of a vendor, the terms set forth in this RFP are to be embodied in a definitive agreement containing such additional covenants and other provisions as may be mutually acceptable.

The State Bar contemplates that, in addition to AIA A151 2007 and AIA A251 2007 form agreements, and the terms described above in this RFP, final agreement between the State Bar and the selected vendor will include, without limitation, the following terms.

Submission of a proposal shall constitute agreement to contract on these terms, except for any term specifically reserved in the proposal for future negotiation.

A. Time of Essence

Time is of the essence with respect to Vendor's performance of the services and equipment to be provided in the final agreement.

B. Warranties and Representations

Vendor warrants and represents that it possesses such expertise, experience and resources to perform the scope of services required in a diligent, timely and professional manner consistent with the standards of the industry. Vendor will supply at all times an adequate number of well-qualified personnel to perform the work. Vendor will provide a contact person available and authorized to remedy any non-conformity with this warranty.

C. Indemnity Obligations of Vendor

Vendor will indemnify and defend the State Bar (including its Board of Trustees, officers, director, agents, employees and volunteers, as the same may be constituted from time to time) from all claims, demands, damages, debt, liability, obligations, cost, expense, lien, action or cause of action (including but not limited to actual damages, fines and attorneys' fees, whether or not litigation is actually commenced) arising out of: (i) the material breach by Vendor of any warranty, representation, term or condition made or agreed to by Vendor; (ii) all products and services prepared by or for Vendor hereunder and provided to State Bar; (iii) any claim or action for personal injury, death or otherwise involving alleged defects in Vendor's business or any of its products or services provided to State Bar; (iv) any breach by Vendor of any statutory or regulatory obligation.

D. Insurance Obligations of Vendor

The Vendor will provide and keep in full force and effect during the term of this agreement, at the Vendor's own cost and expense, the following insurance policies for the joint benefit of the Vendor and the State Bar, with an insurer reasonably acceptable to the State Bar:

1. Commercial general liability insurance with a general aggregate limit (other than products/completed operations) of at least Two Million Dollars (\$2,000,000.00); at least One Million Dollars (\$1,000,000.00) personal and advertising injury limit; at least One Million Dollars (\$1,000,000.00) premises and operations limit; at least One Million Dollars (\$1,000,000.00) each occurrence limit;
2. Workers' compensation coverage as required by law, together with employer liability coverage with limits of not less than One Million Dollars (\$1,000,000.00) per occurrence.
3. Comprehensive automobile liability insurance covering owned, leased, hired and non-owned vehicles with at least One Million Dollars (\$1,000,000.00) combined single limit.

The Vendor will deliver to the State Bar offices at 180 Howard Street, San Francisco, CA 94105 Attn: General Services, true and correct copies of its insurance policies required above, and certificates of such insurance within seven (7) days of the execution of this agreement. Each such policy will name the State Bar as an additional insured and will state that the Vendor's policy shall be primary and that any insurance carried by the State Bar shall be noncontributing with respect thereto. Each such policy will provide for thirty (30) days prior written notice to the State Bar in the event of cancellation or reduction in coverage or amount. If the Vendor fails to secure and maintain insurance policies complying with the provisions of this agreement, the State Bar may purchase the appropriate insurance policies and the Vendor will pay upon demand the cost of it to the State Bar or the State Bar may terminate this agreement. Additionally, if the Vendor assigns any portion of the duties under this agreement, each subcontractor or assignee will purchase and maintain the same insurance coverage required hereunder.

The Vendor will immediately notify the State Bar if the Vendor's commercial general liability insurance contains restrictive endorsements other than those restrictive endorsements normally included in the State of California. If the Vendor's commercial general liability insurance contains such restrictive endorsements, the Vendor shall have five (5) business days to remove said restrictions. If the Vendor is unable to do so, the State Bar may terminate this agreement, and will be required to give the Vendor no more than two (2) days'

notice of such termination, anything in this agreement to the contrary notwithstanding.

E. Termination

1. **At Will.** The agreement may be terminated by the State Bar, in its sole and complete discretion, upon thirty (30) days written notice to Vendor. In the event of termination pursuant to this section, the vendor's sole compensation will be for that portion of services performed or goods delivered up to the date of termination, together with reimbursable expenses, if any then due. Vendor will not be paid for any services, goods or reimbursable expenses associated with any work or service not specifically authorized by the State Bar.
2. **Authorization of Funds.** If the term of this agreement extends into fiscal year(s) subsequent to that in which it is signed, it is understood that the continuation of this contract is subject to the authorization of sufficient funding for such purpose by the California State Legislature. If sufficient funds are not so authorized, the parties mutually agree that the contract may be terminated or amended as appropriate in response to the reduction in funding. If the agreement is terminated, Contractor agrees to take back any affected equipment, products, software, or hardware furnished under this contract, and relieve the State Bar of any further obligation, except for the State Bar's obligation to pay for services already performed pursuant to this agreement.
3. **Default by Vendor.** This agreement may be terminated by the State Bar upon fifteen (15) days written notice to the Vendor in the event the Vendor is in default under any of its provisions. In the event this agreement is terminated due to the default by the Vendor, the Vendor will not be entitled to receive any compensation for services performed or for any reimbursable expenses incurred, and the State Bar will have the right to have the services completed by other parties and the Vendor will reimburse the State Bar for the actual costs to complete the services in excess of the balance of the fee and reimbursable expenses, if any, provided for in this agreement. Any such act by the State Bar will not be deemed a waiver of any other right or remedy of the State Bar, including, without limitation, the State Bar's right to consequential damages caused directly or indirectly by the Vendor's default.
4. **Automatic Termination.** This agreement will automatically terminate on the occurrence of any of the following events: (a) bankruptcy or insolvency of either party; (b) sale of the business of either party; (c) failure to comply with federal, state or local laws, regulations or requirements, or (d) expiration of the agreement.

F. Confidentiality and Publicity

The Vendor will retain all information provided by the State Bar in the strictest confidence and will neither use it nor disclose it to anyone other than employees requiring the information to perform services under this agreement without the prior written consent of the State Bar. The State Bar retains the right to enjoin any unauthorized disclosure in an appropriate court of law. The Vendor will not issue any public announcements concerning the State Bar without the prior written consent of the State Bar.

G. Compliance with Laws

The Vendor agrees to comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of Regs., tit. 2, § 72850.0 et seq.). Vendor agrees to include the non-discrimination and compliance provisions of this clause in any and all subcontracts to perform work under the agreement.

H. Assignment/Subcontracting

1. **Assignment.** The Vendor will not assign or transfer its interest, in whole or in part, under this agreement, without the written consent of the State Bar, which consent may be granted or withheld in the sole and absolute discretion of the State Bar.
2. **Subcontracting.** The Vendor may subcontract with other qualified firms or individuals as required to complete all, or a portion of, the delivery of equipment and services, with the prior written approval of the State Bar.

The Vendor will clearly describe the reason for using any subcontractors, the specific role each subcontractor will play in the project, and the relationship between the Vendor and its subcontractor to be maintained during the term of this agreement. No subcontract will be approved unless the Vendor provides a written guarantee that the Vendor's firm will be contractually obligated to assume all project responsibilities and the insurance requirements set forth above.

I. General Provisions

1. **Force Majeure.** Neither party will be deemed in default of this agreement or any provision hereunder to the extent that any delay or failure in the performance of the obligations of such party (other than the payment of money) results from any significant and material causes beyond its reasonable control and without fault or negligence by such party. Examples of such causes include, but are not limited to, (a) acts of God or public enemy, (b) acts of the government in either its sovereign or

contractual capacity, (c) fires, (d) floods, (e) epidemics, (f) quarantine restrictions, (g) strikes, (h) embargoes, (i) earthquakes, and (j) unusually severe weather.

2. **Governing Law.** The agreement will be governed by the laws of the State of California without giving effect to its principles of conflict of laws.
3. **Attorneys' Fees.** In the event either party institutes any action or proceeding against the other party relating to this agreement, the unsuccessful party in such action or proceeding will reimburse the successful party for its disbursements incurred and for its reasonable attorneys' fees as fixed by the court. In addition to the foregoing award of attorneys' fees to the successful party, the successful party in any lawsuit will be entitled to its attorneys' fees and costs incurred in any post-judgment proceedings to collect or enforce the judgment. This provision is separate and will survive the merger of this provision into any judgment on this agreement.
4. **Audit.** Vendor agrees that the State Bar or its designee shall have the right to review and copy any records and supporting documentation pertaining to the performance of this Agreement. Vendor agrees to maintain such records for possible audit for a minimum of three (3) years after final payment, unless a longer period of records retention is stipulated. Vendor agrees to allow the State Bar or its designee access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. Further, Vendor agrees to include a similar right of the State Bar or its designee to audit records and interview staff in any subcontract related to performance of this Agreement.
5. **License.** In those instances where required, the Vendor represents and warrants that the Vendor holds a license, permit or special license to perform the services pursuant to this agreement, as required by law, or employs or works under the general supervision of the holder of such license, permit or special license and shall keep and maintain all such licenses, permits or special licenses in good standing and in full force and effect at all times while the Vendor is performing the services pursuant to the agreement.